To get started, make sure your speakers are on and turned up.

Look for the directional arrows ⬅ ➡ on the page. You will use these arrows to navigate forward or backward through the presentation. They could be located at either the top or bottom of the page. Once you are finished viewing a page, you will want to click the forward arrow to advance to the next page.

If you need to increase the size of the slide, you can use the zoom function to magnify the image.

If you do not have speakers, you have the option to print a hardcopy of the presentation which includes a written narrative.

Indiana Department of Education
SUPPORTING STUDENT SUCCESS

Center for School & Student Academic Support
Office of School and Community Nutrition

2010 Pre-Order Survey
Slide Show Tutorial

Welcome to the 2010 Pre-Order Survey, slide show tutorial. This slide show was developed to demonstrate the commodity pre-ordering procedures you will be asked to complete in January 2009. We hope this tool will help alleviate any concerns or anxiety you may have about the Survey system and how it works. You are encouraged to view this tutorial as many times as you need in order to become familiar with the Survey and feel comfortable when completing your Survey requests. For those LEAs who completed the Survey last year, many of the procedures you will see are the same.

Pre-Order Survey Overview

The Survey Will:

- be open for 30 days from January 15th, 2009 through February 15th, 2009 which will allow you a month to complete the Survey.
- provide you a better opportunity to spend 100% of your Entitlement and subsequently reduce your food expenses by 18%.
- allow you to request the amounts of raw pounds of commodities you want diverted to a processor and select the specific processor.
- offer you a wider selection of different types and amounts of boxed commodities.
- allow you to select specific months that you want boxed commodities placed into your inventory.

We will always try to honor your Survey requests, however the U.S.D.A. has the final decision regarding the purchase and shipping of commodities.

Before you proceed through this slide show tutorial, please take a few moments to review some of the highlights of the Pre-Order Survey system. Using a Pre-Order Survey system to request your commodities will provide you more flexibility to spend your Entitlement on a wider variety of products. Please note, if you do not complete the Pre-Order Survey within the month timeframe, you will not be able to receive commodities for the 2009-2010 school year and would have to rely on Bonus and Surplus commodities if and when they became available.
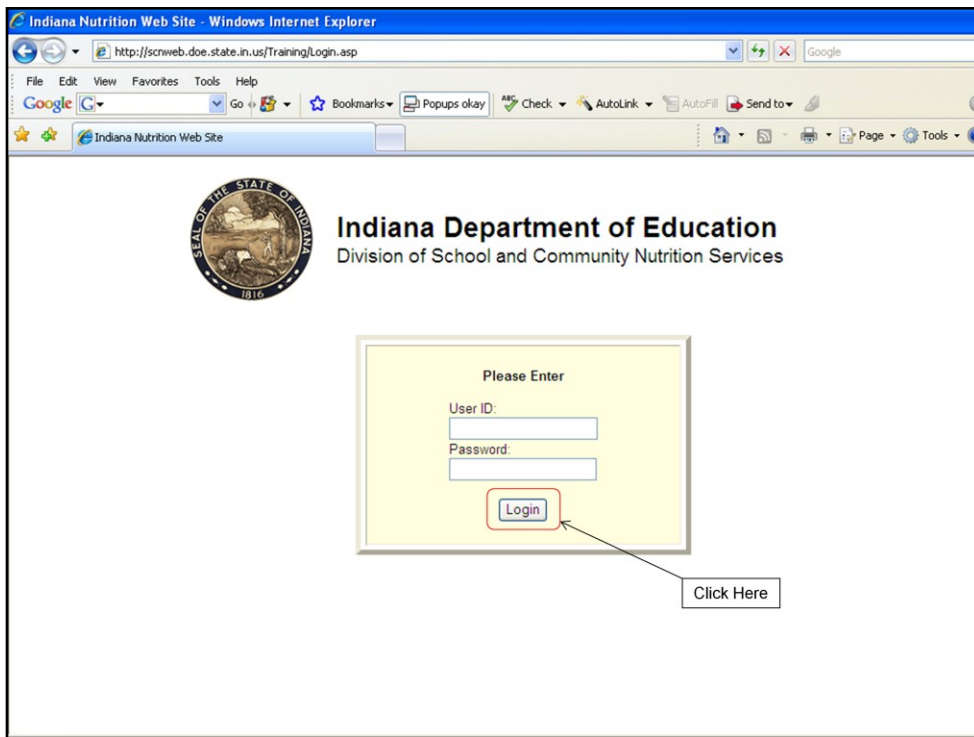
In January, when you are asked to complete your Pre-Order Survey, you will need to go to the following address http://scnweb.doe.in.gov/Login.asp, where you will enter your same master login User ID and Password you use to complete all of your Food Distribution activities.
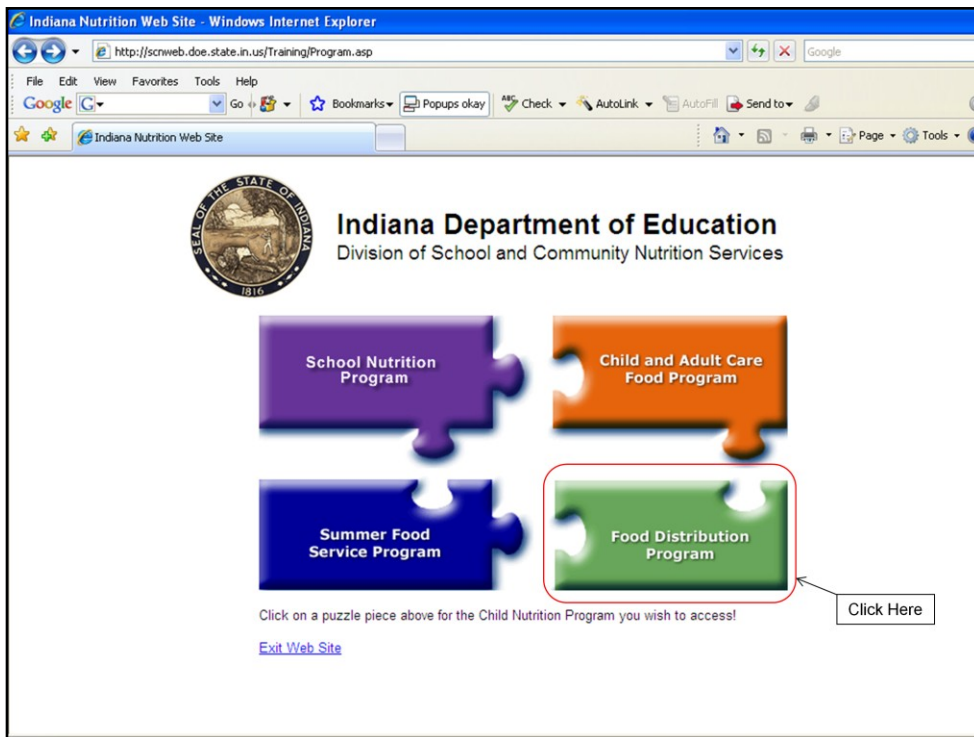
Once you have logged in, you will arrive at this page where you will need to click on the Food Distribution Program Green Puzzle piece to continue.
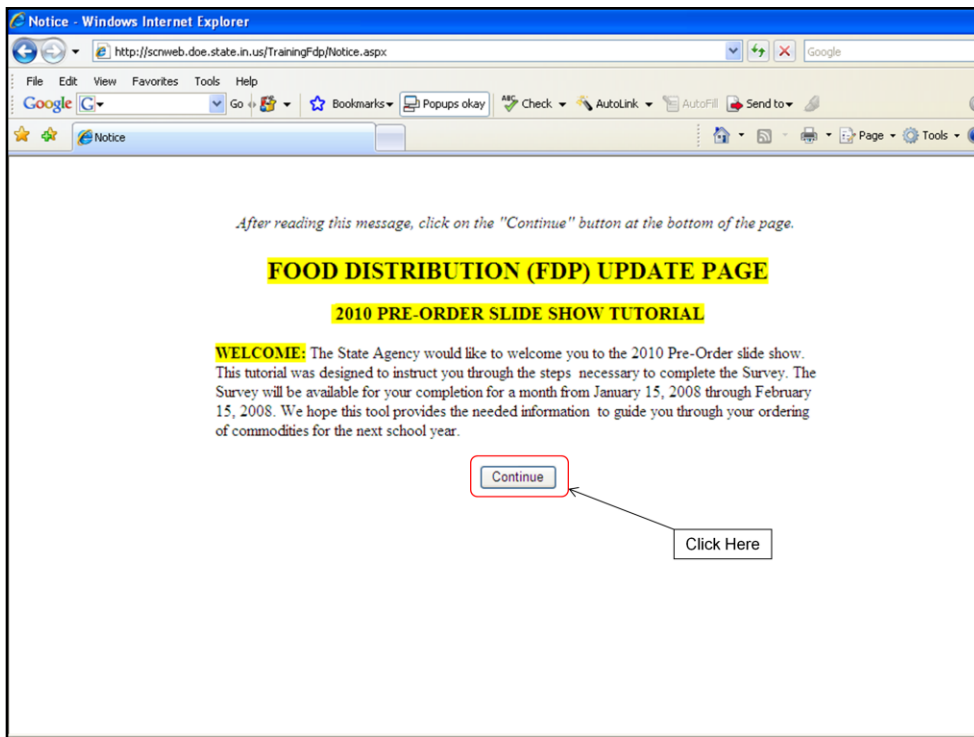
Whenever you log into the FDP Green Puzzle piece, you will come to the Update Page. Always take a few moments to read what is posted. The Update Page is where you can find important commodity information posted throughout the year. When finished, you will need to click the Continue Button at the bottom of the page.
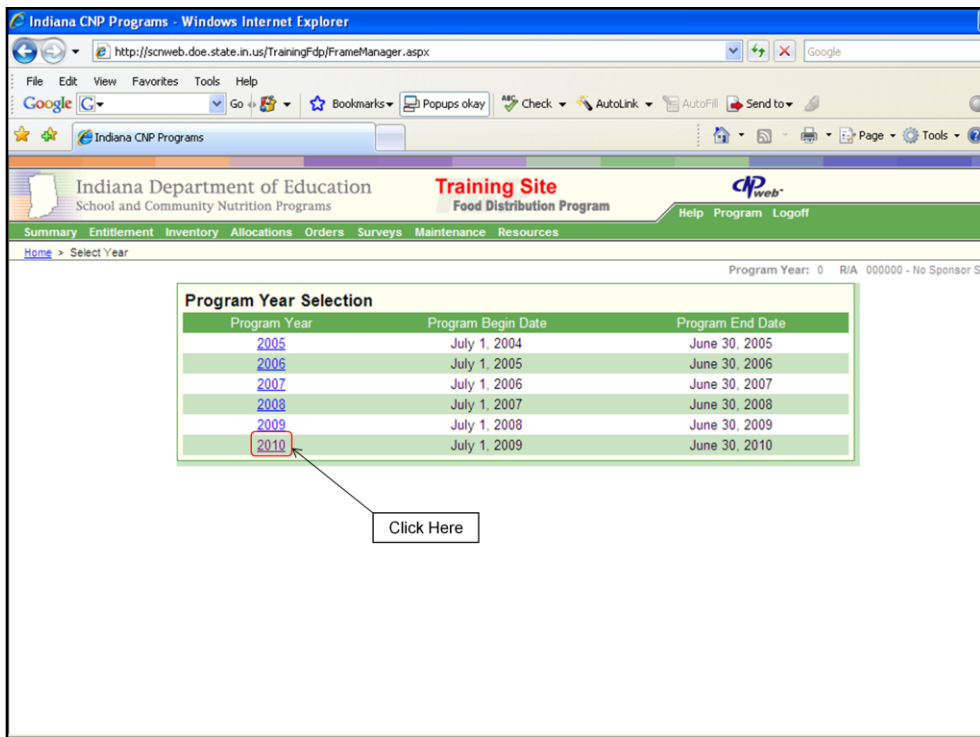
When completing your Pre-Order Survey, you will be entering your commodity requests for the 2009-2010 school year. For this reason, you will need to choose the 2010 Program Year link to complete your Pre-Order Survey.

Now you will see your Recipient Agency Summary Page. You will want to take note of the section labeled "Tabs". Tabs are used to move from one part of the program to another. When completing your Pre-Order Survey, you will only need to use the tabs labeled "Entitlement" and "Surveys". Additionally, do not be concerned your Summary Page is in an "Uncertified" status. Recertification of your information for SY2010 will take place in August 2009.

Next, you will want to select the Entitlement tab to review your balance.

By selecting the Entitlement tab you will see the starting Entitlement balance you will be spending when completing your Pre-Order Survey. For you, this Entitlement balance represents a fiscal asset that you will be managing through the Survey. This balance is your fair share of Indiana's overall yearly allotment from the Federal government. To the Federal government it represents real dollars the USDA will spend on your behalf to procure your commodities for the next school year.

When making your commodity selections, you will be spending your allotted Entitlement at a per pound price for Raw products and a per case price for the End or the "boxed" commodities. If possible, you will want to spend 100% of your Entitlement Balance.

To access your Pre-Order Survey, you will want to select the Surveys tab.

When you select the Surveys tab, you will see a 2010 Pre-Order Survey has been posted. Please take note of the Survey's starting date of January 15th and the closing date of February 15th. The Survey will stay an "Open" status for a month to provide you ample time to make your commodity requests and finalize your choices. Please note, if you do not complete the Pre-Order Survey within the month timeframe, you will not be able to receive commodities for the 2009-2010 school year and would have to rely on Bonus and Surplus commodities if and when they became available. To start filling out your Survey, you will want to select the "Edit" link in the Action column on the right.

Now you will see the Pre-Order Survey. Please take a moment to review this page thoroughly. On the left you will see End Product and Raw Product links. You will select these links when choosing either Raw or End "boxed" commodities. To the right you will see the Product Categories, their associated Percentage Caps and Entitlement values. Please note the beef, cheese, chicken and turkey product categories carry a spending limit or cap. You may spend up to 75% of your total Entitlement balance in these four categories; however the system will not allow you to spend more than the set percentage cap in a specific category. As you work through the Survey and spend your Entitlement balance, your specific spending can be seen in the far right "Entitlement" column. Your Total Entitlement, both available and spent, can be tracked in the upper right side of the page.

To get started, you need to decide whether or not you will be diverting raw products to a processor. It is important to note that you are **not** required to divert pounds of raw commodities to a processor. Diverting raw commodities to a processor requires the Local Education Agency (LEA) to follow certain prescribed procurement procedures and enter into a binding agreement with a specific processor. If by the time you are asked to complete the Pre-Oder Survey you have **not** been in contact with a specific processor regarding procurement and the amount of raw pounds you want to be diverted, you should **not** select a Raw Product link. If you are **not** prepared to request a diversion of raw commodities, you should **only** select the End Product links to request cases of "boxed" commodities.

If you have followed the prescribed procurement procedures regarding the diversion of raw commodities to a processor and are ready to make your survey requests, you will want to select the Raw Product link that corresponds with appropriate Product Category you want. However, if you are **not** prepared to request a diversion of raw commodities or you never intended to, skip ahead to page 26 where the discussion of End or "boxed" commodities starts.

For example, if you are prepared to request a diversion of raw beef to a processor, you will want to select the Raw Product link for beef. Remember, you have the option of starting with your End "boxed" Product requests first and then return to complete your Raw Product requests.

When you select a Raw Product link you will see the specific type of raw commodity and the per pound Entitlement value. Depending on the Product Category, there may be different types of beef, cheese, chicken, etc. available to choose for processing. You must know the type of raw product you want diverted prior to making your selection. When you are ready to proceed, you will want to click the "Select" link on the left.

You will now be ready to choose the processor where you want the raw commodities diverted. At times, the number of processors to where a specific raw commodity can be diverted may vary depending on how many processors are qualified to process that specific USDA commodity.

Once you have chosen a processor, you will want to fill in the corresponding box on the right with the specific number of raw pounds of commodities you want diverted. If you diverted pounds of raw commodities to a processor in the previous year, you must first make sure you will not have any excess raw commodities in your inventory still at the processor at the end of the year school year. If you predict you will have excess raw commodities at the end of the year, you will want to make sure to take those extra pounds into account when figuring the amount of pounds you will need to enter on the Survey. **Do Not** over order or the excess pounds may be subject to removal from your inventory.

Here you can see a selection of a processor has been made and the number of raw pounds has been entered. If you do not need to make another processor selection, you will be ready to select the Submit button at the bottom of the page to confirm your request. You may use the "Calc" button to calculate your Entitlement balance; otherwise it will be adjusted automatically when you submit your request.

Here you can see the raw product request was accepted and the associated Entitlement reduced accordingly. At this time you have the option to change your request by clicking the select link on the left and editing your choices. However, if you are confident in this raw product diversion request and no other editing is needed, you will want to select the "Prev Page" button at the bottom of the page to continue filling out your Survey requests.

Every time you submit a request for your Raw Products, you will be taken back to this page that shows you a running tally of your overall Entitlement Spent, the amount of Entitlement spent per product category, and your available Entitlement left to spend. You now have the option to continue making Raw product diversion requests or start selecting End "boxed" Product requests. In this example, the decision was made to continue making Raw Product diversion requests. The Raw Product link for Cheese was selected.

Again, this page shows the type of cheese to be diverted and the associated per pound Entitlement cost. You will want to click the "Select" link on the left to choose your processor and request the amount of pounds you want diverted.

As before, this page shows the processor choices made for this specific product. Once you have chosen the processor, you will want to fill in the corresponding box on the right with the specific number of raw pounds of commodities you want diverted. You will notice that two processors were selected in this example.

Once you are confident in your choices, select the Submit button at the bottom of the page to confirm your request.

Once you have made your raw product request you will be taken back to this page where you can see the cheese request has been submitted and the associated Entitlement has been reduced accordingly. You have the option to change your request by clicking the select link on the left and editing your choices. However, if you are confident in this raw product diversion request and no other editing is needed, you will want to select the "Prev Page" button at the bottom of the page to continue filling out your Survey requests.

You have seen two examples showing you how to select a Raw Product, the associated processor, and the amount of raw pounds of commodities you want diverted. If you have additional Raw Product diversion requests, you will want to proceed with the same process.

For example, this page shows how the LEA has continued to make all of their commodity requests for Raw Product diversions from multiple categories of beef, cheese, chicken, turkey & vegetables. Please note the overall amount of Entitlement that has been spent, the specific amounts spent per product category and the available Entitlement balance left to spend. You can see for these categories the spending caps have not yet been met; however if you do spend more than a cap allows, you will receive an error message.

You will receive an error message like this alerting you that you have exceeded your spending caps for that specific Product Category. If you do spend more than a cap allows, you will need to make a downward adjustment to your pound or case amounts you requested.

Once you have finished making all of your requests for the raw pounds of commodities you want diverted to a processor, you will now want to start making your requests for the number of cases of boxed commodities you want placed into your warehouse inventory in a given month. To do so, you will want to select the End Product link for the Product Category you want. Be sure to keep a close watch on the amount of Entitlement you are spending in a given Product Category not to exceed your spending cap. Remember, you are **not** required to divert raw commodities to a processor and may decide to receive only cases of commodities instead.

Once you have selected an End Product link, you will see a page that shows the types of cased commodities available. In this example it is Beef. Also listed is the pack size and the per case Entitlement cost. In the monthly selection boxes, you will need to enter the number of cases of boxed commodities you want placed into your warehouse inventory for a specific month. The State Agency will e-mail worksheets that will help you calculate the amount of cases you would need in a month and subsequently for the school year.

You will only be able to request case amounts of commodities for the highlighted months. Some commodities are not available from the USDA every month. You may see some commodities available every month, every other month or perhaps only twice a year. Whether or not a specific commodity will be available in a given month depends greatly on the level of interest in that product statewide and the flexibility the USDA has to purchase them.

In this example, the LEA decided that there was a need for five cases of beef each month and made the request by placing the number "5" in each of the monthly boxes that were available. You are not required to select each available box, but need only fill out the ones that fit your commodity needs. Once you have made your decisions, you will want to select the "Submit" button at the bottom of the page to finalize your requests.

As with your Raw Product requests, every time you submit a monthly request for your End "boxed" Products, you will be taken back to this page that shows you a running tally of your overall Entitlement Spent, the amount of Entitlement spent per product category, and your available Entitlement left to spend. You may now continue making End product requests. In this example, the decision was made to continue making End Product case requests. Notice how the End Product link for Cheese was selected next.

In this example, when the Cheese Product Category was selected, you can see there are three types of boxed cheeses from which to choose. Under certain End product categories you will see multiple product choices. You will want to decide which of the products you want in accordance with your commodity needs and then fill in the number of cases you want in a given month.

In this example, the LEA decided to request boxed Shredded Cheddar Cheese and Sliced American Blend Cheese. They chose not to select the Shredded Mozzarella. Additionally, they decided to request 10 cases of each type of cheese in alternating months. Once you have made your choices, you will want to select the Submit button at the bottom of the page.

The ordering of 90 cases of assorted cheese products for the year triggered an error message alerting the LEA that they have exceeded their spending cap for Cheese products. Remember that the LEA previously requested Raw Cheese to be diverted to a processor. The combination of the Raw and End Product requests contributed to the overspending. If you do spend more than a spending cap allows, you will receive an message indicating that you have over spent and you will need to make a downward adjustment to your pound or case amounts for that product category.

In this example, you can see the LEA made a downward adjustment from the previous 10 case request of Cheddar Cheese in April to 5 cases. The same 5 case downward adjustment was made for the American Sliced Cheese in March. Once you have made your downward adjustments to come into compliance with the Spending Cap, you will want to select the Submit button at the bottom of the page to resubmit and finalize your requests. Remember you have the option to reduce the number of Raw Pounds for diversion instead of your case amounts.

You have seen two examples showing you how to select a End Product, the available months and the amount of cases of commodities you want placed into your warehouse inventory throughout the school year. If you have additional End Product requests, you will want to proceed with the same process.

As before, every time you submit a monthly request for your End "boxed" Products, you will be taken back to this page that shows you a running tally of your overall Entitlement Spent, the amount of Entitlement spent per product category, and your available Entitlement left to spend. You now have the option to continue making End product requests.

This example shows the final results of all Raw and End Product requests made for the entire Survey. Please note that 99.9% of the overall Entitlement was spent. When filling out your Survey requests, should plan on spending as close to 100% of your Entitlement as possible. When you arrive at this final stage, you will still have the option to continue editing and refining your End or Raw product requests. If you are ready to submit your entire Survey, you will need to click the "Submit" button at the bottom of the page to finalize your requests.

Continue to Edit Your Survey While the Status is Open
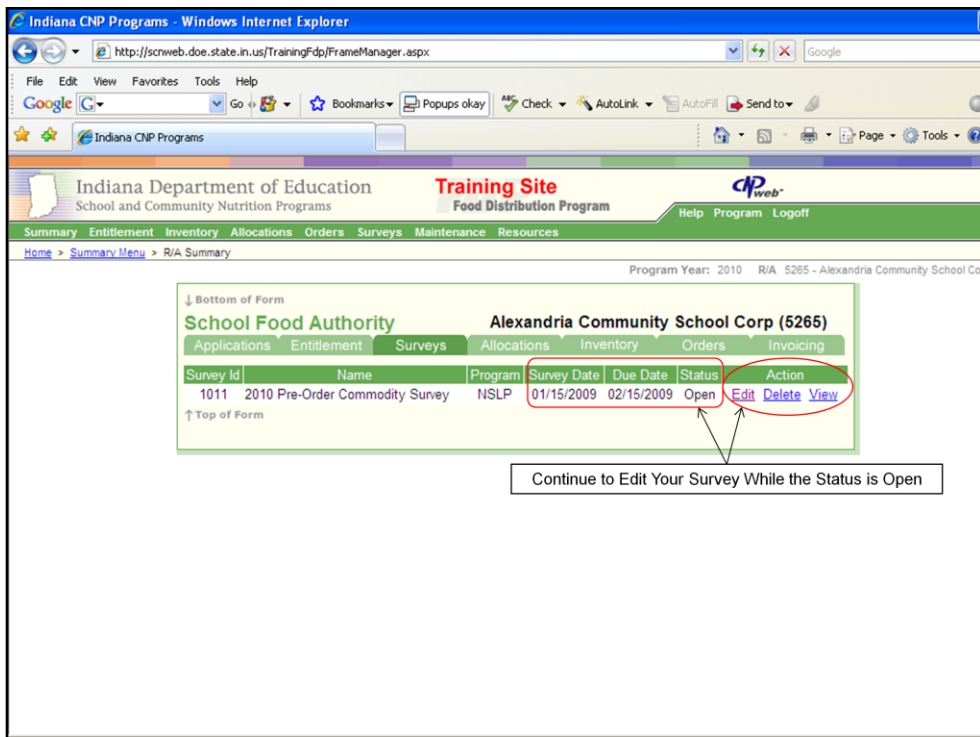
Remember, as long as the Pre-Order Survey is in an "Open" status, you have the option of exiting your Survey and retuning to the 2010 Program Year link to edit your Survey requests at any time. You may exit your Pre-Order Survey throughout the process and return to work on it when it fits your time schedule. You can access the Survey 24 hours a day wherever you have internet capabilities. You may find that you need the 30 day time frame to confirm with your kitchen staff the number of cases of commodities you may need or finalize amounts of pounds of raw products you want to divert to a processor.

When the Survey Due Date Arrives, the Survey Will Move to a Balance Status. At That Time, No Changes to Your Survey Requests Can Be Made. You May Only View Your Results.

Eventually the Survey Due Date will arrive at the end of the day on February 15, 2009, and your part of the Survey will be completed. The Survey will then move to a "Balance" status. At that time, the State Agency will analyze the Statewide results and throughout March and April will balance the requests from the Survey into truckloads of Raw and Boxed commodities. The USDA prefers the States to request commodity purchases by the truckload. Typically a full truckload of raw commodities ranges from 36,000-42,000 pounds and a full truckload of boxed commodities will contain approximately 900 to 1000 cases. During the Balancing process, if the results indicate that there is not enough interest of at least one full truckload Statewide to warrant requesting a commodity purchase, we will not do so. Additionally, the State Agency may make a downward adjustment in the amount of pounds or cases needed to round down to the nearest full truckload. If any of your requests are adjusted, the associated Entitlement value will be returned to your balance.

Once the Balancing process is completed, the Pre-Order Survey will move to a "Fill" status by August 2009. The Survey will stay in the "Fill" Status throughout the school year. As cases of commodities you requested on the Survey arrive at your State contracted warehouse and are placed into your inventory, you will be able to track your commodities throughout the year, by selecting the "View" link in the Action column on the right.

When you select the "View" link in the Action Column to track your cases of commodities, you will see this page which is an overall summary of your commodity choices for your End and Raw products. Note the blue links on the left side in the Product Code column. These are the Raw Products you selected to be diverted to a processor. By clicking on these links you can see the Processor you chose for diversion. If you do not see these blue links, it means you chose not to have raw products diverted.

In the upper right corner, you will see a pull down menu box. By selecting the blue arrow in the box, you can select a specific month so you can review your commodity requests for that month. These reviews will provide you with an accurate idea of what "boxed" commodities you expect to receive in a given month. Remember, when the Survey goes through the balancing process, your commodity amounts may be adjusted. As the year progresses, you can return to this page to see how your inventory of boxed commodities is being filled per your Survey requests.

This example is the bottom half of the previous page. Here you will be able to see the total number of Raw pounds you requested for diversion as well as the number of overall cases of commodities you requested. At times, all of your requests may not be filled in accordance with your Survey selections. Be careful creating menus too far into the future based upon your Survey requests. You should not menu your commodities until you see them in your inventory. Please remember that the State Agency will always try to honor your requests; however the USDA has the final decision regarding the purchase and shipment of commodities.

At the end of the school year, once all the commodities for that year have been distributed, the Survey will move to a "Closed" status. You will still be able to view the final results to serve as a reference when completing future Surveys.

Center for School & Student Academic Support
Office of School and Community Nutrition

IMPORTANT WEB ADDRESSES

- Office of School and Community Nutrition (S & C N)
  http://www.doe.state.in.us/food
- S & C N web Login

  http://scnweb.doe.in.gov/Login.asp
- USDA Commodity Food Network

  http://www.commodityfoods.usda.gov/

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Thank you for taking the time to view this slide show tutorial. We hope it provided you with the information you will need to successfully complete your Pre-Order Survey this January. Please view it as many times as you may need.